

Retention and Classification Report

Agency: Davis County (Utah). Council on Aging (2481)

Davis County Annex-Room 218
50 East State St., P.O. Box 618
Farmington, UT 84025
451-3377

Records Officer Yvonne Christensen

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AGENCY: Davis County (Utah). Council on Aging

SERIES: 11124

3

TITLE: Alternatives program case files

DATES:

ARRANGEMENT:

DESCRIPTION:

These case files document the participation of individuals in the Alternatives Program (TAP). This is a state funded program designed to keep "high risk" individuals (18 years of age or older) as independent as possible in the least restrictive environment and to prevent premature institutionalization. A physician's statement must be obtained stating that services brought into the home are needed for individual to remain at home. Services include case management, homemaker services, respite care, nurses aide, equipment, and coordination with other agencies. Quarterly visits are made to evaluate the care. The files include yearly assessment forms, care plan, client's rights form, client contract, eligibility declaration, summary sheets, needs assessment forms (social and physical, a nurse does the physical assessment), and quarterly review visit forms.

RETENTION:

Retain 4 years after client leaves.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: For records prior to and including 2010. Retain in Office for 4 years after client leaves program and then destroy provided provided all audits have been completed.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11124

TITLE: Alternatives program case files

(continued)

Computer data files: For records beginning in 2011 and continuing to the present. Retain in Office for 4 years after after client leaves program and then delete provided all audits have been completed.

APPRAISAL:

PRIMARY CLASSIFICATION:

Private UCA 63G-2-302(1)(b)

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11419

4

TITLE: Area plan

DATES: 1978-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

Four year administrative plan required by the Older American Act (45 CFR 1321.59 and 45 CFR 1321.65 (1991)) updated annually and submitted to the State Division of Aging. Includes statement on type and amount of services provided to Davis County citizens under the Act.

RETENTION:

Retain 5 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper copy: Retain in Office for 5 years and then destroy.

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the office and meets the federal requirements stated in 45 CFR 1321.50.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11419

TITLE: Area plan

(continued)

PRIMARY CLASSIFICATION:

Public 45 CFR 1321.50 and 45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11131

3

TITLE: Congregate reservation list

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This list records reservations made for meals served at senior centers. It is used for meal planning and to create reports. The form includes center's name, dates, participant's names, days of week, indication of dates reservations made, whether meal served, and whether individual is a volunteer.

RETENTION:

Retain 1 year after final payment.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year after final payment on contract and then destroy.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11131

TITLE: Congregate reservation list

(continued)

PRIMARY CLASSIFICATION:

Public

45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27488

3

TITLE: Davis County transitional program records

DATES: 2008-

ARRANGEMENT: Alphabetical by last name.

ANNUAL ACCUMULATION:

DESCRIPTION:

The Davis county transitional program has been created to help keep Utah senior citizens safe while living in their homes so that they will not have to move to a nursing facility. This program is similar to the Alternatives Program. The records contained in this series are used to monitor client services, and document medical conditions and financial expenditures. These records contain personal information, including name, address, phone number and Social Security number. These records also include medical information, and may include financial and caregiver information.

RETENTION:

Retain 4 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 19, Item 1.

AUTHORIZED: 09/02/2010

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years and then destroy.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27488

TITLE: Davis County transitional program records

(continued)

APPRAISAL:

Administrative Fiscal Legal

PRIMARY CLASSIFICATION:

Private 63G-2-302(1)(2)

SECONDARY CLASSIFICATION(S):

Controlled. 63G-2-304(1)(2)

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11142

3

TITLE: Food delivery report

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This is a report on the condition of foods delivered to senior centers. It is used for compiling reports and for future planning. The report includes center name, date, time food arrived at center, temperatures for milk and hot and cold foods, homebound and congregate meals, time homebound meals left kitchen, a list of any missing items, a list of any additional foods, any comments from center staff and clients, and suggestions.

RETENTION:

Retain until monthly report compiled.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until monthly report compiled and then destroy.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11142

TITLE: Food delivery report

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11147

3

TITLE: Food invoices

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This invoice lists foods being delivered to senior centers for congregate and homebound meals. It is used for planning purposes. The invoice includes date, center name, food list, alternatives provided, and signature.

RETENTION:

Retain 3 years after final payment.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years after final payment on contract and then destroy.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11147

TITLE: Food invoices

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11165

3

TITLE: General ledgers

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

These are summaries showing the "amount of receipts from and disbursements of each department" (UCA 17-19-6 (1995)). May also include documentation from subsidiary ledgers to general ledger and accounting adjustments in the form of general entries.

RETENTION:

Retain 10years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 10 years and then destroy.

APPRAISAL:

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11144

3

TITLE: Homebound authorization

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

These are cards on all clients receiving meals at home (Meals-on-Wheels). They are used for reference purposes. The cards include client's name, address and telephone number, days scheduled to receive meals, name and telephone number to contact in an emergency, physician's name and telephone number, date service started and date service cancelled.

RETENTION:

Retain 1 year after participation ends.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until superseded or 1 year after participation ends and then destroy.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11144

TITLE: Homebound authorization

(continued)

PRIMARY CLASSIFICATION:

Exempt 45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11128

3

TITLE: Homebound route sheets

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This weekly list documents those individuals who have made reservations to receive meals at home under the Homebound Program (Meals-on-Wheels). It is used for meal planning and to create billings. The list include site, week and year, clients' names and addresses, days of week, indication which days reservations were made for delivery of meals, and a check by driver to indicate whether meal was delivered.

RETENTION:

Retain 1 year after final payment.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year after final payment on contract and then destroy.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11128

TITLE: Homebound route sheets

(continued)

PRIMARY CLASSIFICATION:

Exempt 45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11129

3

TITLE: Homebound time sheet

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This worksheet is used to record the amount and types of services that a homemaker has provided to a specific client. All information is transferred to an official payroll record. This information is used in the creation of reports. It includes date, client's name, homemaker's name, dates worked, hours worked and services provided per day (special diet supervision, feeding, dressing and grooming, child care, cooking and meal preparation, general housework, errands, etc.).

RETENTION:

Retain 3 years after contract ends.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 3 years after contract ends and then destroy provided provided all audits completed.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11129

TITLE: Homebound time sheet

(continued)

PRIMARY CLASSIFICATION:

Private UCA 63G-2-301(1)(e)

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11136

3

TITLE: Master participant list

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

These are lists of persons participating in specific senior center activities. They are used for planning purposes. They are updated at least annually. The lists include date, program or activity title, and participants' names.

RETENTION:

Retain until superseded.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: For records prior to and including 2010. Retain in Office until superseded and then destroy.

Computer data files: For records beginning in 2011 and continuing to the present. Retain in Office until superseded or obsolete.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11136

TITLE: Master participant list

(continued)

PRIMARY CLASSIFICATION:

Exempt 45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27485

3

TITLE: Medicaid waiver for individuals 65 and older

DATES: 2010-

ARRANGEMENT: Alphabetical by last name.

ANNUAL ACCUMULATION:

DESCRIPTION:

This record series is used to monitor Medicaid clients' medical status, to coordinate services and care, and to record expenditures accrued. These records include personal information such as name, phone, address, social security number, medical data, and may include financial information. These records are required by State statute.

RETENTION:

Retain 6 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 08/2010

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 6 years and then destroy.

APPRAISAL:

Fiscal Legal
administrative

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27485

TITLE: Medicaid waiver for individuals 65 and older

(continued)

PRIMARY CLASSIFICATION:

Private 63G-2-302(1)(2)

SECONDARY CLASSIFICATION(S):

Controlled. 63G-2-304(1)(2)

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27487

3

TITLE: National Family Caregiver Support Program records

DATES: 2001-

ARRANGEMENT: Alphabetical by last name.

ANNUAL ACCUMULATION:

DESCRIPTION:

The National Family Caregiver Support Program (NFCSP), established in 2000, provides grants to States and Territories, based on their share of the population aged 70 and over, to fund a range of supports that assist family and informal caregivers to care for their loved ones at home for as long as possible. These records are used to monitor client services, medical condition, financial expenditures, and the caregiver status for persons who receive aid through the National Family Caregiver Support program. These records contain personal information, including name, address, phone, social security number, and may include financial information. These records also include medical information.

RETENTION:

Retain 4 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 19, Item 1.

AUTHORIZED: 09/02/2010

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years and then destroy.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27487

TITLE: National Family Caregiver Support Program records

(continued)

APPRAISAL:

Administrative Fiscal Legal

PRIMARY CLASSIFICATION:

Private 63G-2-302(1)(2)

SECONDARY CLASSIFICATION(S):

Controlled. 63G-2-304(1)(2)

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27486

3

TITLE: New Choices waiver records

DATES: 2007-

ARRANGEMENT: Alphabetical by last name.

**ANNUAL ACCUMULATION:
DESCRIPTION:**

The New Choices waiver helps eligible individuals move out of nursing facility settings. Services are designed to help people transition out of a nursing facility and re-establish themselves back in the community. These records are used to monitor client services, expenditures, and medical status. The records contain personal information, including name, address, phone, social security number, and may include financial information. These records also include medical information.

RETENTION:

Retain 6 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 08/2010

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 6 years and then destroy.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 27486

TITLE: New Choices waiver records

(continued)

APPRAISAL:

Administrative Fiscal Legal

PRIMARY CLASSIFICATION:

Private 63G-2-302(1)(2)

SECONDARY CLASSIFICATION(S):

Controlled. 63G-2-304(1)(2)

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11157

3

TITLE: Organizational files

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

These are graphic illustrations providing a detailed description of the arrangement and administrative structure of the county. These files contain organizational charts, reorganizational studies, functional statements, and formally prepared descriptions of the responsibility assigned to executive officers.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 1, Item 76.

AUTHORIZED: 09/18/2015

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office permanently.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11157

TITLE: Organizational files

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11127

3

TITLE: Quarterly program performance report

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This is a quarterly statistical report on all programs administered by the agency which is submitted to the State Division of Aging. The state compiles statistics and returns the report to local agency for subsequent quarters and a final annual report.

RETENTION:

Retain 2 years after final payment.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years after final payment on contract and then destroy.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11127

TITLE: Quarterly program performance report

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11141

3

TITLE: Senior center annual report

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This report is submitted to the local aging and adult services administrative office on senior center activities. It compares the current years activities with the previous year's. It is used for future planning.

RETENTION:

Retain until administrative need ends. Transfer to Archives.

DISPOSITION:

Transfer to the State Archives with authority to weed.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until administrative value has been met and then transfer to State Archives with authority to weed.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11141

TITLE: Senior center annual report

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11133

3

TITLE: Senior center class rolls

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

These forms record the participation of individuals in programs or activities held at senior centers. These activities include creative arts, transportation, income tax assistance, and health screenings. The rolls are used to compile monthly, quarterly, and annual reports. They include program or activity title, month and year, participant's name, date, and a check indicating whether person participated in activity or program.

RETENTION:

Retain 1 years after final payment.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year after final payment made and then destroy.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11133

TITLE: Senior center class rolls

(continued)

PRIMARY CLASSIFICATION:

Exempt 45 CFR 1321.5

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11137

3

TITLE: Senior center's monthly report

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This is a monthly report on senior center activities. It is used to compile quarterly reports for the State Division of Aging Services. This report includes senior center name, date, actual service units provided, service (general category access service, in-home, community service, other services, meals, and transportation), year-to-date budget, actual budget, and current budget.

RETENTION:

Retain 4 years after final payment.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years after final payment on contract and then destroy and all audits have been completed.

Paper copy: Retain in Office until quarterly report completed and then destroy.

Computer data files: For records beginning in 2011 and continuing to the present. Retain in Office for 4 years after final payment on contract and then delete provided all audits have been completed.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11137

TITLE: Senior center's monthly report

(continued)

APPRAISAL:

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11139

3

TITLE: Senior center's quarterly report

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This is a quarterly report on all service units provided at senior centers. It is submitted to the aging and adult services administrative office and is used to compile reports for the State Division of Aging. This report includes senior center name, date, actual service units provided, service (general category access service, in-home, community service, other services, and transportation), year-to-date budget, actual budget, and current budget.

RETENTION:

Retain 4 years after final payment.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: For records prior to and including 2010. Retain in Office for 4 years after final payment has been made on contract and then destroy provided provided all audits have been completed.

Paper copy: Retain in Office until annual report compiled and then destroy.

Computer data files: For records beginning in 2011 and continuing to the present. Retain in Office for 4 years after final payment

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11139

TITLE: Senior center's quarterly report

(continued)

has been made on contract and then delete provided all audits
have been completed.

APPRAISAL:

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11126

3

TITLE: Title V personnel case files

DATES:

ARRANGEMENT: None

ANNUAL ACCUMULATION:

DESCRIPTION:

These files document the participation of persons in the Senior Service Employment Program under 20 CFR 641 (2008). This program provides for the hiring of low-income persons over the age of fifty-five. The files include income certification form, client intake form, any related correspondence, and if applicable termination forms.

RETENTION:

Retain 4 years after client leaves.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years after client leaves the program and then destroy provided all audits have been completed.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11126

TITLE: Title V personnel case files

(continued)

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

Public. UCA 63G-2-301(1)(b)

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11130

3

TITLE: Title V quarterly progress report

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This is a quarterly report that is submitted to the U.S. Department of Health and Human Services on persons employed through the Senior Community Service Program. It includes the sponsor's name and address, month and year, program number, agreement number, subproject number, project period, number of enrolled positions established, unsubsidized placement goal, number of enrollees and enrollment levels, job inventory, categories indicating services to general community and services to elderly community, enrollee characteristics (sex, education, race/ethnic group, income, age), signature, date, and may include an attached narrative report.

RETENTION:

Retain 2 years after final payment.

DISPOSITION:

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RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years after final payment on contract and then microfilm.

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11130

TITLE: Title V quarterly progress report

(continued)

APPRAISAL:

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11132

3

TITLE: Title XX eligibility declaration

DATES:

ARRANGEMENT: None

ANNUAL ACCUMULATION:

DESCRIPTION:

This form is completed by a service worker to determine whether an individual is eligible to receive services from the agency. It includes applicant's name, address, and social security number; reason for eligibility; birth date, income declaration, indication of action taken (open, close, redetermination), and applicant's and service worker's signatures.

RETENTION:

Retain 4 years after client leaves.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years after client leaves the program and then destroy provided all audits have been completed.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11132

TITLE: Title XX eligibility declaration

(continued)

PRIMARY CLASSIFICATION:

Exempt 45 CFR 1321.51

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11148

3

TITLE: Title XX transportation provider service report

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This report is used to receive reimbursement from the federal government for provided transportation services. It includes service provider name and address, billing period, service category, contract number, name of clients provided transportation, eligibility code, service activity, number of service units, rate of reimbursements, reimbursement request, fee assessed, subtotals, grand totals, provider's signature, and date.

RETENTION:

Retain 4 years after final payment.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years after final payment on contract has been made and then destroy provided all audits have been completed.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11148

TITLE: Title XX transportation provider service report

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11143

3

TITLE: Van driver's instructions

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This is a form signed by all senior center van drivers. It is used to inform the driver of all driving policies. The statement includes a listing of driving policies, general statement on van insurance information, comments on winter driving, driver's signature and date.

RETENTION:

Retain 1 year after separation.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year after separation of employee and then destroy.

APPRAISAL:

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11143

TITLE: Van driver's instructions

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Davis County (Utah). Council on Aging

SERIES: 11163

3

TITLE: Working papers

DATES: undated

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

These are project background records, such as studies, analyses, notes, drafts, and interim reports.

RETENTION:

Retain 5 years after project completed.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule CNT 1, Item 30.

AUTHORIZED: 10/20/1992

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 5 years after project completion and then destroy.

APPRAISAL:

PRIMARY CLASSIFICATION:

Exempt 45 CFR 1321.51